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ABSTRACT

The case study method, a technique for examining realistic organizational problems through systematic analysis, is a very useful tool in the organizational communication class. Case analysis involves the identification and examination of salient issues causing the problems that organizational members are experiencing, as well as the development of strategies for addressing those issues. The case method, which is particularly well suited for aiding students in learning about complex organizational phenomena, helps students both recognize the role of communication in effective organizational functioning and expand their knowledge of organizational research and theory, fostering their analytical insight into the nature of organizational processes. It also helps instructors to generate class discussion and to illustrate and clarify important organizational concepts. The most important prerequisite for case analysis is the instructor's ability to set a conducive atmosphere. The quality of case analysis is largely dependent on the quality of the case history presented. The case must be carefully selected or prepared to reflect course information and demonstrate important theories in organizational communication, to enable students to apply their knowledge to the analysis. (HTH)

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**"Using the Case Study Method In Organizational Communication
Classes: Developing Students' Insight, Knowledge, and Creativity"**

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"Using the Case Study Method In Organizational Communication Classes: Developing Students' Insight, Knowledge, and Creativity"

Introduction to the Case Study Method

The case study method is a technique for examining realistic organizational problems through systematic analysis. Typically, in the case study method a description of a potentially problematic real-world phenomenon, (in organizational communication classes - a description of a troublesome situation organization members are encountering), is presented to students. This description is referred to as the case or case history, and is generally presented in written form, although cases may be presented orally or through use of media. Students are encouraged to perform the critical role of case study analyst. Case analysis involves the identification and examination of salient issues causing the problems organization members are experiencing in the case, as well as the development of strategies for addressing and rectifying the case issues and problems identified. The case study analyst must demonstrate a combination of insight, knowledge, and creativity in identifying relevant issues causing organizational distress in the case under examination, analyzing these issues in light of relevant (organizational communication) research and theory, and devising realistic and appropriate strategies for helping organization members cope with the problematic situation presented in the case, (Schnelle, 1967; Mier, 1982).

The quality of case analysis is largely dependent on the quality of the case history presented. The case history provides the analyst with critical information about the organization under examination. It is the task of the analyst to examine and interpret the evidence presented in the case history. Good case histories provide students with intriguing data that leads them to in-depth study and potentially heuristic analysis. Lawrence describes the benefits of selecting high quality cases for analysis:

A good case is the vehicle by which a chunk of reality is brought into the classroom to be worked over by the class and the instructor. A good case keeps the class discussion grounded upon some of the stubborn facts that must be faced up to in real-life situations. It is the anchor on academic flights of speculation. It is the record of complex situations that must be literally pulled apart and put together again before the situations can be understood. (Lawrence, 1953, p. 215).

The selection of appropriate cases to present to students for analysis is crucial. The case must be carefully selected (or prepared) to reflect course information and demonstrate important theoretical issues in organizational communication. Case histories that provide realistic problem situations that reflect important theories and concepts of organizational communication enable the student/analyst to apply their studies to strategic organizational problem identification and solution.

Case studies can be integrated in organizational communication classes using several different instructional strategies. For example, the instructor can have students read a case history and then present the class with his or her own case analysis. This is an

especially useful strategy when first initiating case analysis as a class instructional method. By presenting the class with his/her own analysis of the case, the instructor demonstrates the proper manner for conducting case analyses and gives class members examples of how organizational theory can be applied to case analyses. Cases can also be analyzed by the group aloud in class by both students and instructor through class discussion. After students have some experience with case studies and are familiar with the case study method, it is often beneficial for the instructor to assign students a case to analyze on their own and have them develop their own case study reports. Case study reports may be assigned as written class work, and turned in to the instructor for evaluation, or they can be assigned to individual students or student teams for oral class presentation. Oral presentations of case analyses can be a good stimulator for in-depth group discussion and critique.

The instructor should facilitate effective in-class case study analysis as a discussion leader. Schmidt and Lipstreu, (1975), suggest the roles of the effective case analysis discussion leader includes drawing attention to neglected facts, asking questions about points raised by participants, questioning the impact of different courses of action suggested, encouraging the group to ask questions and provide detailed commentary, and discouraging vague generalizations and ready-made solutions. The discussion leader can also raise the level of case analysis by clearly identifying and exemplifying the crucial role of organizational theory and research

in analyzing case histories and developing strategies for organizational innovation. Case study work is most productive when the instructor helps the students integrate case examples with course information. The instructor should also help process student interpretations of cases, recognizing that there is no one right evaluation of any case history but many different viable perspectives on case analysis. The instructor should emphasize to students that the best case study analyses are methodical, reasoned, and substantiated by organizational theory and research.

The case study method is by no means a totally new educational method, (Dooley and Skinner, 1977). It has its roots in the Socratic method of education where the instructor tells students a story about a problematic situation and queries them about how they might solve the problem. Case study work provides students with many questions. Learning is accomplished by attempting to answer the questions presented. The case method has been extensively used in business, medical, library, social work, and legal education. The strength of the case method for organizational communication instruction is that it is particularly well suited for helping students to learn about complex organizational phenomena. For example, the case study method has a long and productive history of usage in management education at the Harvard University Business School, where it has helped prepare students to become effective organizational analysts and decision-makers, (McNair and Hersum, 1954; Andrews, 1953; Trei, 1958; Harvard Business School, 1965). The case study has been used as an

instructional tool in many textbooks concerning organizations, where case histories and/or case analyses have been included to illustrate theories about organizational behavior, (White and Vroman, 1982; Kreps and Thornton, 1984; Glover, Hower, and Tagiuri, 1973; Gildea and Haas, 1975; Haney, 1972). In recent years, several authors have written popular books about organizations which present real case histories to validate their perspectives about organizational life, (Peters and Waterman, 1982; Deal and Kennedy, 1979; Terkel, 1972; Harragan, 1977). The extensive utilization of the case method would seem to indicate the case method offers substantial benefits in education. In the remainder of this paper I will examine some of the educational functions of the case study method, and examine its specific applications in organizational communication instruction.

Instructional rationale

Organizational communication education is an applied area of study that examines theory and research about the role of human interaction in organizational life, (Carney, 1979; Pace and Ross, 1982). Organizational communication study is rooted in the actual communication behaviors performed by organization members in the accomplishment of organizational tasks. Case study analysis is an instructional method that encourages students' application of relevant organizational communication theory to organizational practice. Case studies bring organizational communication theory to life by enabling the student to visualize how the theory relates to

organizational analysis, organizational problem solving and improvement of organizational performance.

Case studies can help organizational communication students recognize the role of communication in effective organizational functioning. Gildea and Haas, (1975, p.4), describe how case studies illuminate the uses of organizational communication when they wrote, "...case studies are presented to show how others initiated or enhanced their organization's commitment to an ongoing program of effective communication." Additionally, the use of case studies in organizational communication courses can provide many pedagogical benefits for both instructors and students. For example, Mier suggests the case method can be used in organizational communication courses to help accomplish the following three instructional goals:

1. To help formulate key concepts introduced in textbook readings and classroom lectures....
2. To help reinforce learning through application of key concepts covered in lectures, readings, films, and textbook cases (student case studies).
3. To help students pinpoint the communication issue as it relates to other organizational contingencies (textbook cases and student cases), (Mier, 1982, p. 151).

Further pedagogical functions of the case study method in organizational communication instruction include:

1. Helping instructors generate class discussion by presenting meaningful situations for class exploration and posing questions about case analysis and problem solving.
2. Helping instructors illustrate and clarify important organizational communication concepts by relating these concepts to examples from case analyses.

3. Helping to expand students' knowledge of organizational communication research and theory by encouraging students to search for explanatory research and theory in diagnosing case problems.

4. Helping to promote students' recognition of the uses of organizational communication theory and research by demonstrating that theory can be effectively used to analyse case problems and direct strategies for helping organization members to cope with case problems.

5. Helping to foster student's analytical insight in the nature of organizational processes by encouraging them to examine organizational activities, diagnose the sources of organizational problems, and develop strategies for organizational innovation.

6. Helping to facilitate students' ability to demonstrate creativity in making decisions about solving organizational problems. Past research has demonstrated that the ability to make decisions and solve organizational problems is one of the most valuable communication-related skills organization members can possess, (DiSalvo, 1980).

7. Providing students with experience in business writing and professional presentations in the preparation of written and oral case study reports.

Schmidt and Lipstreu identify five additional benefits of the case method as an effective learning device:

1. Provides a satisfying learning opportunity because it combines two essentials--realism and participation.
2. Provides opportunities for the development of social skills; of respect for the opinions of others; of effective participation in a group; of improved understanding of why people act as they do.

3. Bridges the gap between knowledge and skills.
4. Acquaints individuals with the elusiveness of wisdom and truth and the complexities of administrative situations.
5. Provides opportunities for effective role-playing, in which a role player may see himself as others see him.
6. Offers experiences in which people, in varying degrees, learn to modify or get rid of some of their prejudices because they must take into account the different views presented, (Schmidt and Lipstreu, 1975, p. 2).

The case study method has many potential benefits for organizational communication education, if used properly. The following section of this paper will outline some guidelines for the effective utilization of the case method.

Guidelines For Using Case Studies

Glover and Hower, (1953), claim that the most important prerequisite for case analysis is the instructor's ability to set a conducive atmosphere for case analysis. The instructor's ability to establish rapport with students will help establish a favorable climate for case analysis. A favorable climate for case analysis is one where students feel free to answer questions, present their idiosyncratic points of view, and creatively analyze the case under review. "This means a permissive atmosphere in which they (students) feel free to put forth their ideas and their questions without the instructor's reacting in the form of rejection, derision, blame or authoritarian injunctions to think along certain other lines preferred by the instructor at that moment. This free atmosphere will be fostered if the instructor makes up his mind to hear and try to understand what students have to say, and encourages others to do

the same," (Glover and Hower, 1953, p. 14). Gibbs', (1961), notion of developing a supportive climate by stressing communication behaviors that are nonjudgemental, cooperative, empathetic, and spontaneous, seems to provide a viable model for establishing a communication climate in the organizational communication class that is conducive to productive case study analysis.

As mentioned earlier in this paper, the selection of an appropriate case for analysis is an important criteria for effective use of the case study method. An appropriate case provides the analyst with enough information to provide the organizational communication student with sufficient clues as to the underlying problems the organization under examination is experiencing, without analyzing the situation for the student. Additionally, a good case should illustrate concepts that are relevant to the research and theory being covered in the organizational communication class. Cases should be as realistic as possible, including background information about characters in the case, the organizations examined, and the relationships among characters. The most enriching cases describe "...the process by which actions take place," and may include conversations between characters "...recorded as nearly verbatim as possible," (Ulrich, 1953, p. 31). The richer the case selected for case study analysis, the more likely the case study is to be an effective pedagogical tool in organizational communication classes.

Case study reports must be well organized and explanatory of the

nature of problems confronting the organization. The case study report lends itself to a conventional three-part analytic structure of: 1) problem identification; 2) analysis; and 3) recommendation, (Bernthal, 1975). In the problem identification section analysts examine the case history and, based upon the evidence presented, diagnose different key issues that are causing the organizational difficulties to occur. In the analysis section the case study analyst examines why the problems are occurring and describes current knowledge about the organizational issues identified. Finally, in the recommendation section the analyst devises strategies for relieving the problems facing the organization.

In identifying relevant issues in a case history there must be a systematic search for important evidence within the case, identifying the underlying issues confronting organizations, as well as identifying the more readily evident problems. Analysts must recognize the mutual influence of different systems, subsystems, and both internal organizational and environmental factors in identifying key issues confronting organizations. Once key issues are identified they are prioritized in terms of the strength of each issue's influence on the organization and in causing the problematic situation the organization finds itself in. The analyst must be able to distinguish between primary issues, sub-issues, and mere symptoms of issues confronting the organization. Furthermore, the analyst should be able to demonstrate pertinent evidence presented in the case history that led to the identification of problem issues.

In the analysis section of the case study report the analyst must examine the issues and problems diagnosed previously in the problem identification section of the report and describe why these issues cause problems for organizations. An important factor in the analysis section is that relevant organizational theory and research must be applied to the case study. The analyst must explore the issues confronting the organization in the case in light of their knowledge of organizational theory and research. It is organizational theory that enables the analyst to fully analyze the case history. Organizational theory helps the analyst address such questions as: Why are these issues arising? What negative influences do these issues have on organizational functioning now and what negative affects might they produce in the future? What are some of the productive ways that organizations (in general) can deal with the issues identified? How do these productive organizational strategies relate to the specific organization under examination? The more complete the analyst's search and application of relevant organizational research and theory to the case is, the more enlightening the case study analysis will become.

In the recommendations section of the case study report the analyst examines the issues identified and analyzed in the first two sections of the report to shed light on how organization members might redirect organizational activities to help relieve the problems incurred in the case. The analyst must be careful to devise recommendations which address each of the issues identified in the

problem identification section. Furthermore, the organizational innovation strategies the analyst suggests must be consistent with the issue analysis and theoretical evaluations presented in the analysis section. For example, if the case study analyst identifies a defensive communication climate as being a key issue causing problems in an organizational case history, and describes some of the communication behaviors that leads to and reduces defensiveness in organizations in the analysis section, then the recommendations the analyst suggests must deal specifically with the defensive climate issue and follow the theoretical guidelines for dealing with defensive climates presented in the case analysis section. Case study analysts should be concerned with developing both short-range strategies for relieving organizational problems immediately, and long-range strategies for preventing similar problems from occurring again. In this manner, the analyst reacts appropriately to the present organizational situation, as well as devising strategies for helping organization members become more proactive in preventing and defusing potential organizational difficulties.

Case analysis then, begins with identification of salient issues contributing to organizational difficulties, examination of the nature of these issues with regard to organizational research and theory, and development of strategies for helping organization members resolve these problems. Bernthal, (1975), echoes many of the guidelines for case analysis that have been identified here when he specifies that effective case study analyses should be systematic,

recognize the interdependence of organizational systems and subsystems, be realistic and explanatory, and be research and theory-based. In the following section of this paper I will provide an example of a typical case study report assignment that follows the guidelines presented above.

Sample Case Study Report Assignment

The case study report should be written in a professional manner, typed, double-spaced, as though you were a consultant hired by the organization to help solve the problems described in the case. There should be three major sections in the case study report:

1. Statement of the Problem(s): succinctly state what you decide are the most pressing problems facing the individuals (and the organization) in the case. Explain why you think these are the major issues in this situation. What information presented in the case leads you to identify these issues? (Be careful to look for the root issues causing problems in the case. Often the most obvious problems in a case are merely symptoms of more basic underlying problems. You may want to identify both main issues and sub-issues).

2. Analysis: based on your knowledge about the nature of organizational communication explain why you think the problems you have identified (in the first section) are occurring. Shed some insight into the reasons problems such as the ones in this case occur in organizations. How do the issues you identify affect organizations in general? How should the organizational

communication concepts be utilized effectively? (Be sure to relate your analysis to organizational communication theory).

3. Recommendations: Develop realistic strategies for alleviating the problems you have identified and analyzed (in the first two sections). Indicate how the recommendations you suggest may be implemented within the organization. (Be sure to differentiate between short-term strategies to help the organization cope with the existing problems and long-term plans designed to keep these problems from emerging again. Short-term strategies are generally reactive, while long-term strategies are more proactive). What specific activities should organization members engage in to initiate the recommendations you suggest?

Conclusion

The case study method is a potentially useful pedagogical tool that can be successfully used in organizational communication classes. Case work is most productive when cases are openly discussed in class. Student involvement and creativity in case study discussions should be encouraged. Effective use of case studies can promote the development of students' insight, knowledge, and creativity. Case study work helps cultivate student insight by providing students with experience in recognizing and diagnosing organizational problems. Case study work can expand students' knowledge of organizational theory by demonstrating how to apply relevant research and theory to organizational analysis and

problem-solving. Case study work can also help develop students' creativity by providing them with the opportunity to examine and interpret case histories, identify salient facts and issues emerging out of the case histories, and develop organizational development strategies for helping organization members cope with organizational difficulties.

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